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ABSTRACT

This handbook for construction project planning was developed to be used by the Oregon Department of Education to evaluate existing facilities and determine the projected needs for each of the community college districts. Each college district's eligibility for state participation in funding is based on a Basic Space Need (BSN) which is the square footage as determined by state-approved standards. Elements in this overall Construction Assistance Plan (CAP) include: (1) determining space eligibility based on enrollment projections, types of building blocks (e.g., classrooms, labs, learning centers), basic space need, and space eligible for funding (the result of subtracting available space from basic space need); (2) developing applications for construction based on ranking of projects, exceptional space need considerations, and estimation of available capital funds as outlined by project planning guidelines which focus on limits of state aid, and new construction, facility purchase, equipment, and other costs; and (3) developing the capital budget request through ranking of eligible projects and recommendation of the capital budget request to the state board by the state superintendent. Appendices contain state board guidelines, enrollment projection methodology, space classification, space norms, project application guidelines, procedure for ranking projects, and long-range planning considerations. (ME)

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CAP

CONSTRUCTION ASSISTANCE PLAN

Handbook for Construction
Project Planning
Oregon Community Colleges

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JC 790 143

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Approved by State
Board of Education
2/16/78

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CONSTRUCTION ASSISTANCE PLAN

INTRODUCTION

The 59th Legislative Assembly allocated sufficient funds to liquidate entirely the state's unmet obligation for community college construction projects financed solely by local funds. As a part of that legislation, the Assembly directed that:

> "During the 1977-79 biennium, the State Board of Education, in consultation with the Oregon Community College Assembly and such others as are appropriate, shall establish priorities and recommendations for financing community college capital construction projects, taking into account such criteria as the State Board may consider appropriate."
> (Oregon Laws 1977, Chapter 711, Section 5 [1].

The Construction Assistance Plan (CAP) has been developed in response to that direction. The plan will be used by the Oregon Department of Education to evaluate adequately existing facilities and determine the projected needs for each college district. The plan will provide the basis for requests to the Legislature that will increase or modify college facilities.

The plan is structured so that:

(1) construction will conform to policy decisions,

(2) identified future needs will support sound planning,

(3) basic facility needs can be projected for each college district and

(4) the concept of "prior credit" is eliminated.*

Each college district's eligibility for state participation in funding is based on a Basic Space Need (BSN), which is the square footage need as determined by state approved standards. Each college district, in cooperation with the Department, will develop a BSN figure for various types of spaces; e.g., classrooms, labs, learning centers.

*Special note will be made of the five projects listed in the 1977 legislation (Oregon Laws 1977, Chapter 711, Sec. 6 [2]).

Generally, eligibility is represented by the BSN less the space already available. As a college district constructs facilities, square footage will be subtracted from its BSN. Any eligibility remaining to a district would continue for future consideration. The state will provide 75 percent of construction cost. BSN projections will be revised biennially. The amount of state support available each biennium would, of course, depend on legislative action.

Elements of Plan Include

1. The Basic Space Need of each college is identified by building blocks.
2. Eligibility is expressed in gross square footage, as well as by building blocks of space categories, based upon state-approved standards.
3. A ceiling on eligibility for state construction funds is established for each college.
4. State approved enrollment projections are treated as a major factor in determining facility needs.
5. Local district matching funds must be provided.
6. Facility eligibility is reviewed biennially and a project priority list established by the State Board.
7. Construction funding is based on currently indexed costs, with a limit set on state participation.
8. Provisions are made for purchase of existing facilities as well as new construction.

Editorial Note: The text of this plan is presented on the right-hand pages, and text commentary on the left-hand facing pages.

In keeping with the legislative directions, CAP was recommended to the Emergency Board on May 12, 1978. The Emergency Board acted to "accept without endorsement the report of the Department of Education on its Community College Capital Construction Plan, with direction to the Educational Coordinating Commission to continue with the analysis of the plan and to develop possible alternatives" with the understanding the State Department of Education would use the plan to develop the 1979-81 biennial request for construction funds. The action does not bind the legislature to accept either the plan or the resulting request for funds.

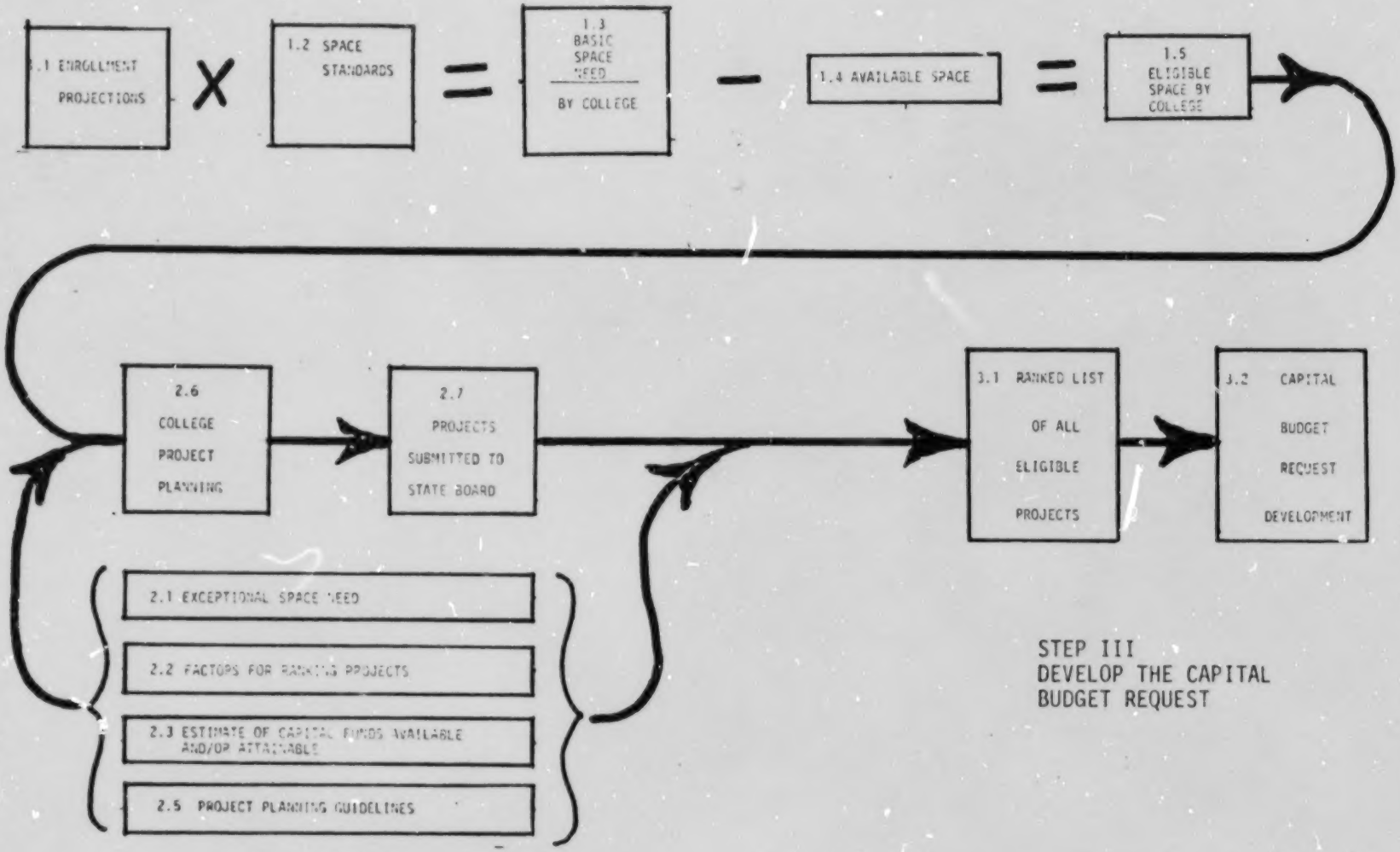
CAP FLOW CHART

Commentary:

The three steps of the flow chart represent the first three sections of the plan's text. Where possible, the text refers back to the specific box of the flow chart by reference to the number of the box. For example: on page four of the text the title, Enrollment Projections, has the number (1.1). This number refers to the box numbered (1.1) on the flow chart.

FLOW CHART OF
CONSTRUCTION ASSISTANCE PLAN (CAP)

STEP I
DETERMINE SPACE ELIGIBLE
FOR STATE AID



STEP II
DEVELOP COLLEGE PROJECTS

STEP III
DEVELOP THE CAPITAL
BUDGET REQUEST

Commentary:

A. Enrollment Projections (1.1)

Projections will be based upon historical enrollment trends; knowledge about proposed new programs; and information regarding population growth, district service levels, and other appropriate indicators of enrollment. (See Appendix B for definitions, assumptions and procedures.)

The projections will be completed as a part of the long-range planning process. (See Appendix I for effect of program approval process on enrollment projections.)

FTE projection for the 1980-81 academic year will be used to calculate basic space needs, and for 1982-83 and 1984-85 to predict future needs.

Total reimbursable FTE is used here to correspond to the projections used for the state operating budget request. The influence of "non-campus housed" FTE has been accounted for in adjustments of the space standards.

I. DETERMINE SPACE ELIGIBILITY

A. Enrollment Projections (1.1)

Projections of the total reimbursable full-time equivalent (RFTE) students for each college will be the primary enrollment indicator used in this plan.

Projections will be made for a base year which will be used for the biennial request. Projections will also be made for the base year plus two years and the base year plus four years.*

Projections will be developed jointly by staff members of the Department of Education and the college districts.** Projections will be approved by the State Board and reviewed by the Oregon Educational Coordinating Commission.

* See Appendix I
** See Appendix B

Commentary:

The nine building blocks are described in detail in Appendix C: Space Classification.

Specifically excluded from consideration for state aid by the legislature are the following facilities: student or faculty housing, spectator facilities for athletics, student health facilities, noninstructional parts of student centers, and recreational facilities.

B. Building Blocks (1.2)

The Plan will provide state funds for only certain of the facilities which a college district might construct and receive state aid. The facilities referred to here and elsewhere in the plan as allowable space* are grouped into the following nine building blocks:

1. General Classrooms

   (Included are lecture and lecture-demonstration areas, seminar and general purpose rooms)

2. Laboratories/Shops

   (Variable space and requires special-purpose equipment and support space)

3. Office

   (Houses instructional and noninstructional staff)

4. Library/Learning Resources

   (Books and A/V materials, student study areas and support space)

5. Special Use

   (Noninstructional support space--i.e., greenhouses, animal quarters, and counseling clinics.

6. Physical Education

   (Inside instructional and support facilities)

7. Assembly and Exhibition

   (Noninstructional primarily for large group meetings or exhibition areas)

8. Support Facilities

   (Includes maintenance and storage areas--also nonstructional computer space)

9. Nonassignable Space

   (Circulation, custodial, mechanical and structural areas)

*Space for which state aid could be allocated.

Commentary

The basic space needs of a college will include only that space (the building blocks) for which state aid could be provided.

A record of BSN per building block for each college district will be kept by Department staff. 1/

This space need procedure is not intended to describe the exact space requirements of any college district or campus but to provide a statewide allocation process. Program mix and operating style will dictate the variances that may be appropriate among the building block categories.

BSN will be calculated for the base year (1980-81), for base year plus two (1982-83) and for base year plus four (1984-85).

1/ Appendix D--Building Block Norms

C. Basic Space Need (1.3)

The basic space need (BSN) of a college district is expressed in terms of gross square footage. A district's basic space need is derived in the following manner:

1. small colleges (under 3,000 RFTE)

   (RFTE x 94.5 square feet) + (52,000 square feet for basic p.e. and assembly)

2. large colleges

   (RFTE x 76.8 square feet) + (52,000 square feet for basic p.e. and assembly) + (5.7 square feet x [.9 RFTE - 3,000]) for additional p.e. and assembly.

D. Space Eligible for Funding (1.5)

Eligible space (1.5) is the result of subtracting available space (1.4) from basic space need (1.3).

Available space is the sum of:

1. All usable space under the 24-hour control of a college district regardless of source of funds*, plus
2. Space for which a contract has been let as of the date of ranking of the projects, less
3. Space which will be eliminated from use as a result of a project being submitted and documented within the long-range plan of the district**, less
4. Space classified as assembly and exhibition or physical education facilities that is currently available, or under construction, which is in excess of the applicable building block allocation and financed totally with local funds.

Assembly facilities constructed solely from local property tax funds and officially dedicated by the district exclusively for noncollege community functions and non-FTE producing events shall not be deemed under the control of the college district for these purposes. The district shall renew annually the dedicated use of the facility.

State support will not be provided for construction in excess of the gross square footage of eligibility for the district.

Each biennial request will contain a six-year projection of eligible space.

* The exterior space will be added to the Space Available in the Non-Assignable Building Block at the rate of one (1) foot of Non-Assignable Space for three (3) feet of inventoried space.

** See Appendix I

Commentary:

If it can be demonstrated that some portion of space owned by a district is not usable or fully usable, only that portion of the space which is usable will be counted as available. Such nonusable space must be confirmed by the State Board. (See Appendix C, page A-31-c for a definition of "non-usable Areas")

Eligible space will be calculated for the 1979-81 biennial request for the base year (1980-81), and as indicators of future need for the base year plus two (1982-83) and for the base year plus four (1984-85).

A record of eligibility per building block for each college district will be kept by the division staff. A district may choose to build beyond the standard square footage of a particular building block. The overage must be approved and the application must indicate the building block from which such space is being subtracted.

When a college district has assembly and exhibition or physical education facilities currently available or under construction which are larger than state standard allocations would provide and those facilities have been constructed with only local funds, the excess space would be deducted from the "available space." In order to provide for such an adjustment, the district having such excess square footage must request that the Department remove the excess from the space available figure. Provisions will be made to confirm that such facilities were financed with local funds. (See page 11, B-2-b for limitations on state participation under CAP.)

Commentary:

1. Factor for Ranking Projects (2.2)

   Department staff will follow these steps in assisting with this process:

   a. Suggestions for priorities will be sought from the local districts and other interested parties.

   b. Statewide goals, needs and priorities identified through the state long-range planning process* will be considered for their implications for capital construction.

   c. Develop a proposal for priorities.

   d. College officials and others will review proposal.

   e. Recommendations will be forwarded by Department staff to the State Superintendent for consideration by the State Board.

   The State Board will adopt its priorities in time for them to be available with the project guidelines. (For the 1979-81 biennial request, the State Board will adopt its priorities as a part of the process of adoption of the construction plan.)

2. Exceptional Space Needs (2.1)

   For the 1979-81 biennial request, the Department staff will consult with the colleges involved and develop the data including cost estimates and documentation for relevant projects. (See Appendix H-2.) The state staff will recommend acceptance of projects in this category to the State Board.

* See Appendix E

II. DEVELOP APPLICATIONS

A. General considerations

1. Factors for Ranking Projects (2.2)

In order to assure that statewide goals influence the process of determining state construction funding, the State Board shall review the factors used to rank the projects and may adopt priorities for the biennium under consideration.

2. Exceptional Space Needs (2.1)

The State Board will identify projects needed by colleges which lack essential facilities in the building blocks and whose enrollment projections preclude funding under the ranking system. These projects will be placed at the top of the ranked list. *

The proportion of the estimated funds available (II A 4) represented by the exceptional space needs will be noted prior to the campus planning step 2.6.

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* See Appendix H-2, Page A-40-a for the Procedure to be followed in identifying such needs.

Commentary:

Ranking 1979-81 Projects:

Extensive consideration was given to posible ranking factors and priorities to be used. Several were given special attention but are not proposed for use during the 1979-81 period for the reasons noted.

1. Vary the amount of state support in order to take into account significant regional differences in community college building costs. However, it was determined that the appropriate indices were not available to make such adjustments.

2. Encourage projects which are in the building block of the college with the lowest percent of completion for that college. This factor would have the effect of encouraging the completion of facilities according to the standards for the building blocks. However, this would not serve the unique needs of a particular college.

3. Use factors which would support regional programs, decentralized facilities, purchase rather than new construction and facilities planned for joint use with another public agency. In each case it was felt that the programs and activities which would be favored are not clearly-compatible-stated goals of the State Board. Nor is it clear that the construction plan is an effective means of encouraging such program and activity planning.

4. Recognize utilization of classrooms--shops/labs as a factor. A recent study (Fall Term, 1977) indicates high correlation between utilization and the proposed ranking factor of space eligibility perentages for the various college districts. It would, therefore, appear that utilization as another factor materially would not affect the ranking of projects.

3. Ranking 1979-81 Projects*

Providing for the Basic Space Needs of each district will be the single priority-objective to be used in ranking projects for the 1979-81 biennial request.

Provision for ranking:

a. Percent of Basic Space Need represented by eligibility by district.

b. Districts will identify their order of priorities where more than one project is submitted.

* See Appendix F

Commentary:

3. Estimate of Capital Funds Available (2.3)

Budget planning estimates will be developed and revised in the following manner:

a. Preliminary assessment of state fund needs for the 1979-81 period will be made by the Community College Division staff, with the advice and counsel of Department staff and college district officials (prior to submission of specific project requests by the college). Considerations such as the following will be used in making this assessment:

(1) The needs of the college districts based upon their eligibility.

(2) Local matching funds available.

(3) State Superintendent's priority recommendations to the State Board for this segment of the Department budget.

(4) Past legislative appropriations for this purpose.

b. The budget planning estimate will be recommended to the State Superintendent.

4. Estimate of Capital Funds Available (2.3)

The State Superintendent will adopt an estimate of funds to be obtained from the legislature. This estimate will be used as a planning tool.

Commentary:

Remodeling of existing usable facilities is not included in CAP.

If a portion of an existing district facility is judged to be less than fully usable when calculating available space, a project for remodeling including equipment will be acceptable if it is planned to create usable space. This space will be counted as available space and deducted from eligibility if the project is funded. This will be permitted in a facility which a college district has purchased and where remodeling is required to make it usable. The cost of purchasing will not be allowed if the contract for purchasing has been concluded prior to the allocation of funds by the legislature.

The rationale for not including remodeling here is that CAP deals only with need for space in addition to current space while remodeling is done for purposes of altering or improving existing space.

Limits of State Aid

The type of facilities eligible for state financial assistance was limited to a greater extent by the 1977 Legislature. An increase from 65 percent to 75 percent of allowable costs, therefore, appears justifiable. Upper limits on project cost per square foot will be established by the Division staff.

In order to assure more equitable distribution of availble state funds for the 1979-81 biennial period, an upper limit of funds for small and large districts has been established. The lower limit was set to discourage small projects since substantial eligibility exists in several districts and considerable local effort is expected.

Equalization as a Limiting Factor

It was recognized that there are inequities across the state due to the college's unequal ability to raise tax support, but it was rejected for the following reasons:

a. In any given biennium only a limited number of college districts will receive allocations for construction and those allocations will be for projects of various size and costs. The equalization factor could not be applied uniformly to all districts.

b. The districts vary in the degree of completion of their facilities. Therefore, the application of an equalization factor at this time would not have a uniform effect.

c. Attempting to solve the problem by manipulating the effect of only one service such as community college construction without considering the total tax need/effort and total resources could not assure a remedy. It may be compounding the problem.

d. The magnitude of the problem is such that the effort to use the construction allocation as a solution would be insignificant.

B. Project Planning Guidelines (2.5)

1. Definition

A capital project for purposes of this plan may be to construct or to purchase a facility or facilities. The facilities included in the project must be identified as space for an activity included in the master plan of the college.

2. Limits of State Aid

a. Percent of Support

The state's participation is limited to 75 percent of the allowable costs of a project. State funds will not be made available for the funding of that portion of a project which would result in the college exceeding its total eligibility.

b. Assembly & Exhibition or Physical Education Facilities

State participation will be limited to the basic space need provided for in each of these respective building blocks categories.

c. Project Size and Total Allotment to a District

The dollar limits on projects or total state allotment to a district for the 1979-81 biennial period have been established as follows:

	Low*	High**
Small Colleges (under 3,000 FTE)	$ 50,000	$ 2,300,000
Large Colleges	185,000	4,000,000

* Minimum state aid request for any one project in the biennium

** Maximum state aid request for one or more projects for a district in the biennium

Commentary:

Prorating Projects

If an application is submitted to construct or purchase a facility which is not totally reimbursable, it shall be divided into allowable space for which state aid is permissible and nonallowable space. (See Appendix H)

3. New Construction

   A method for estimating upper limits on project costs per square foot for state aid purpose will be established by Division staff.

4. Purchase

   The Department staff will establish guidelines for:

   a. cost of purchase

   b. content of contract

   c. procedure for contracting

   d. remodeling

5. Lease and lease-purchase were considered as projects. However, it has been determined that sufficient need exists to construct or purchase additional facilities during the next biennial period, thus making it impractical to consider lease and lease-purchase.

6. Other Allowable Costs

   The Department staff will establish guidelines for the inclusion of these costs.

3. New Construction

Projects for new construction will include only facilities described in the building blocks, equipment and other allowable costs.

4. Purchase

Projects for purchase of facilities will include only facilities described in the building blocks, equipment and, with some exceptions, other allowable costs. Remodeling will be allowed.

5. Equipment

Fixed and moveable equipment which is related to the purposes implicit in the building block descriptions may be a part of project. Only initial equipment may be included. Equipment is allowed only as a part of a facilities project.

6. Other Allowable Costs (May be submitted only as a part of a facility project)

a. Services: Project costs may include the cost of services for architectural, engineering, legal assistance and special facility planners directly related to the project.

b. Landscaping: Projects may include the cost of landscaping which is directly related to the structure.

Commentary:

c. Art Work: Art work allowed may be an integral part of the building, attached thereto, or capable of display in other buildings. Art work may not be part of a leasing project.

When it would not be appropriate to place works of art in a given structure, the funds authorized for a project shall be expended to acquire works of art for placement in other buildings under the control of the college district. Title to these works of art vests with the college district.

These provisions coincide with those adopted in HB 2199, 1977 Oregon Laws pertaining to all state buildings.

Submission of Applications:

All applications must be submitted to the Department of Education before July 1, 1978.* The Department will provide as much technical assistance as possible to institutions completing this process.

A separate application will be submitted for each project.

*This date will vary each biennium.

Forms will be supplied by the Department (Appendix E).

c. Art Work: Project costs may include provisions for art work at an allowable cost of not more than 1 percent of the total project cost.

d. Parking: Parking will be allowed as a part of a project. The amount of parking allowed will be that parking necessary to accommodate the number of people being served by the facility.

e. Utilities Access: Project costs may include the cost of making utilities accessible to the facilities in the project, but limited to on-site access developmental costs which provide utilities for the facility.

7. Project-related costs not allowed for state aid are:

a. Land acquisition costs (either raw land or the land portion of an existing facility).

b. Significant costs incurred in developing a site such as major grading of site, clearing of site, and development of service substitutes upon a site.

c. The cost of providing traffic and utility access to the site.

d. Costs associated with program planning.

C. Submission of Applications (2.6)

Applications will be submitted to the Department of Education. The application will be signed by:

(1) the chairman of the local board,

(2) the institution's president, and will indicate:

(3) the person preparing the application.

Commentary:

A. Ranking of Eligible Projects (3.1)

1. Department staff will prepare the ranked list of eligible projects.
2. The ranked list will be disseminated to the college districts. There will be a period of time in which college officials will have an opportunity to review the decisions with the Division staff.
3. Department staff will recommend the ranked list of projects to the State Superintendent for approval by the State Board for use in preparing the Capital Budget Request.*

B. Capital Budget Request Development (3.2)

1. The Department staff, with the advice and counsel of Department staff and college district officials, will review and revise the planning estimate of funds available for Capital Budget Request.
2. Starting at the top of the ranked list, sufficient projects will be selected to match the amount established in step 1 above.
3. The list established in step 2 above will be recommended to the State Superintendent for approval by the State Board.

* The Associate Superintendent for the Community College Division of the Department will provide an appeal procedure for college district use.

III. Develop the Capital Budget Request

A. Ranking of Eligible Projects (3.1)

A single list of ranked projects will be made including construction, and purchase of facilities projects.

1. Projects meeting the requirements established by the State Board will be ranked in keeping with the following factors:

   a. Percent of BSN represented by the eligibility of the district.

   b. District priorities, when a district submits more than one project.

B. Capital Budget Request Development (3.2)

1. The State Superintendent will recommend the Capital Budget Request to the State Board.

APPENDIX A

Guidelines for the Proposed Plan for State Financial Aid for Community College Facilities

RESOLVED, That the State Board of Education approve the proposed guidelines in principle (as amended) and instruct the construction plan committee to continue the development of the construction plan to recommend to the Board. (Adopted 11/1/77)

INTRODUCTION

The 1977 Legislature directed the State Board of Education, in consultation with the Oregon Community College Assembly and such others as are appropriate, to develop a plan for financing community college capital construction. In order to carry out this responsibility, the State Board adopted a procedure which divides the task into two phases. First, a series of statements which include guidelines, assumptions, definitions and explanations would be developed, discussed widely and finally agreed to by the State Board. Secondly, the plan for creating the biennial request for construction funds would be developed, discussed widely and adopted by the State Board. The legislation calls for review by the OECC and subsequent action by the Emergency Board.

In developing the recommendations to the State Board, the committee took into consideration the role of the community colleges as specified in ORS 341.009. The committee also considered a variety of indicators such as the short- and long-range plans of the districts, increases in enrollments, changing programs and a variety of temporary facilities being used.

A number of pressing issues need to be addressed by any construction plan which is adopted: (a) Individual districts need to know what state aid they can reasonably anticipate receiving within some time period based on the adequacy of current space as well as anticipated growth; (b) An average cost or some other standard cost factors should be established to describe the limits of state funding rather than using a percentage of the actual cost of construction; (c) The extent of state participation in updating district facilities and the need to lease facilities.

Phase One

The following statements shall guide the development of the capital construction plan. They are grouped into five categories:

Part A - General Guidelines

Part B - District Eligibility Factors

Part C - Priority Elements

Part D - Special Considerations

Part E - Related Issues

A. General Guidelines

1. Provisions will be made in the plan to identify the state's role in support of (a) new construction, (b) remodeling and rehabilitation[1/] of existing facilities to complete basic space needs,[2/] and (c) leasing of facilities.

2. The plan will identify the elements of basic space need for each community college district and the eligibility for state support to fill those space needs. (The difference between existing on-line space[3/] and basic space need determines the amount of eligibility.)

(A glossary of terms will accompany the plan.)

1/ Remodeling changes the use of a space. Rehabilitation improves a space for its current use. (Definitions to be refined.)

2/ Because the concept of a campus is inadequate to determine the facility needs of a community college district, the concept of basic space need has been used instead. Space eligible for funding is the sum of the space needed to house the instructional program of the college minus the on-line space. (Definition to be refined.)

3/ On-line space will include only those spaces which are suitable for the current or projected program of the college. (Definition to be refined.)

3. Temporary[3/] facilities will be identified in each community college district and will not be charged against that district's eligibility.
4. Separate priority lists will be submitted to the Legislature for community colleges (as opposed to all postsecondary).
5. Because the smaller colleges may be unable to achieve as efficient space utilization as the larger colleges, the smaller colleges will receive a positive weighting factor determining basic space need.
6. The approved construction costs which the state will share in is the dollar amount of the construction contract less any portion thereof reimbursed or otherwise funded by federal funds.
7. The criteria which determine project eligibility and priority shall be based on objective measures.

B. District Eligibility Factors: That portion of the plan which will determine district eligibility for state construction funds will be designed to meet the following requirements.

1. The plan will identify the basic space needs of each community college district and define the limits of district eligibility for state participation in construction of new facilities, the remodeling and rehabilitation of existing facilities, and leasing of facilities.
2. Student or faculty housing, spectator facilities for athletics, student health facilities, noninstructional parts of student centers, and recreational facilities are not to be included in the determination of basic space need.
3. Building functions, square footage-FTE relationship, enrollment projections, and current utilization of facilities will be used in establishing eligibility (including but not limited to these factors).

3/ Temporary facilities: (To be defined.) A plan to phase out temporary facilities will be established for each district.

4. Enrollment projections (FTE) will be approved by the State Board.

5. A space will be considered for eligibility as a rehabilitation or remodeling project if:

   a. it is declared to be substandard for health, safety or other reasons such as accessibility by local, state or federal regulations

   b. a change of program makes it necessary

   c. it is inadequate by state space standards (to be developed as part of plan)

   d. it is a part of a long-range plan (as other facilities become available)

C. Priority Elements: New construction, remodeling and rehabilitation and leasing of facilities which have been judged to be eligible for funding will be ranked by project on two or more separate lists to represent the State Board's priority. Ranking will be based on the following guidelines:

1. The ratio between present on-line space and the basic space need shall be a major factor in determining priority.

2. All types of eligible facilities will be given equal weight unless the State Board wishes to establish priorities affecting construction, rehabilitation, remodeling or leasing. Such priorities will be expressed as measurable criteria and will be included as a part of the plan in advance of the submission of projects by the districts. This will be a major factor.

3. When more than one project from a district is eligible, the districts' priorities will be a factor.

D. Special considerations

1. If the district is unable to secure the local match for a project by the end of the first year of the biennium, the State Board should

be authorized (with E. Board concurrence) to reallocate the state funds for a project with a lower ranking.

2. If the ranking system results in a tie of two or more projects, then equity ranking based on past receipt of state funding will be used.

3. The plan will identify colleges which lack essential facilities and whose growth patterns preclude funding under the ranking system. The State Board will adopt a program for meeting these needs.

E. Related Issues

1. Equalization: The committee considered the question of equalization. It was agreed that there were inequities across the state due to the unequal ability to raise tax support, but the committee rejected the idea of the use of the construction allocation as a solution to this problem for the following reasons:

   a. In any given biennium only a limited number of college districts will receive allocations for construction and those allocations will be for projects of various size and costs. The equalization factor could not be applied uniformly to all districts.

   b. The districts vary in the degree of completion of their facilities. Therefore, the application of an equalization factor at this time would not have a uniform effect.

   c. Attempting to solve the problem by manipulating the effect of only one service such as community college construction without considering the total tax need/effort and total resources could not assure a remedy. It may be compounding the problem.

   d. The magnitude of the problem is such that the effort to use the construction allocation as a solution would be insignificant.

2. The committee considered varying the amount or rate of state support in order to take into account significant regional differences in building costs. However, it was determined that the appropriate indices were not available to make such adjustments.

The introduction will include a statement that the State Board supports the current statement of policy in ORS - specifically ORS 341.009 (14).

Other related issues which have been raised will be discussed in the plan document.

APPENDIX B

ENROLLMENT PROJECTION METHODOLOGY

A. The Role of Enrollment Projections within the Construction Assistance Plan: Enrollment projections provide the means by which knowledge regarding current conditions and desired standards can be transformed into predictions of future space needs. The Construction Assistance Plan includes methods of quantifying current space conditions (Space Available [1.4]) and desired space standards (Building Block Space Standards [1.2]) and of relating them to student enrollment. As a result, by projecting enrollments two, four and six years into the future, desired standards can be applied to predict the total space requirements (Basic Space Needs [1.3]) of each college district at key points in time. Then, by identifying discrepancies which may exist between current space conditions and future space requirements, it is possible to make some rather specific predictions regarding future needs for new construction (Eligible Space [1.5]).

B. Definitions and Assumptions: A uniform definition of the term "enrollment projection" and key assumptions about the term have been made in order to assure that the enrollment projections used within the Construction Assistance Plan are comparable and as reliable as possible.

1. Enrollment Projection Defined: An enrollment projection is the best available prediction of the number of full-time equivalence (FTE) students who will be enrolled at future points in time in courses within a reimburs-

able course category at a given community college district or group of districts.

2. Key Assumptions: To assure that a given enrollment projection is the "best prediction available", any enrollment projection used within the Construction Assistance Plan will be developed in such a way that the following assumptions can be made about it:

- It is based upon, at least, six years of verifiable, historical enrollment data.
- It is a prediction of enrollment in a course category uniformly used by each community college district.
- It was developed in consideration of proposed new programs and their enrollment implications.
- It was developed in consideration of population trends and the levels of service (FTE per 1000 population) within each community college district.
- It was developed jointly by staff members from affected community college districts and from the Department of Education.
- It was developed using the most recent enrollment data and planning information available.
- It was considered and approved by the State Board of Education.

C. Procedures Followed: The enrollment projection process used to predict enrollments for Oregon community colleges is designed to serve planning efforts of various kinds, including those associated with the Construction Assistance Plan. It is designed to provide discrete headcount projections for use by program planners at the institutional and state levels, and it is designed to provide FTE projections of use to financial analysts and planners concerned with the fiscal needs of Oregon's community colleges. The process requires that community college officials and Department staff members develop projections jointly during three procedural phases. The following outline indicates the the roles played by community college officials and Department staff members in following the enrollment projection process:

1. Phase One:
    a. College Districts:
        (1) Identify "key courses" (first year and second year) for each approved program.
        (2) Identify proposed new programs being considered for initiation during the next six years.
    b. Department of Education:
        (1) Develops linear projections of FTE enrollments by reimbursement category.
        (2) Develops linear projections of headcount enrollments in approved programs. (Based upon historical enrollments in "key courses" identified by college districts.)

(3) Reviews census and population data to identify population growth trends for each community college district.

(4) Conducts study of district service levels and predicts future service levels.

2. Phase Two:

a. College districts:

(1) Review projections developed by the Department during Phase One.

(2) Develop FTE enrollment projections, using institutional techniques.

(3) Develop headcount projections for each approved program, using institutional techniques.

(4) Develop headcount projections for each proposed new program.

b. Department of Education:

(1) Updates projections developed during Phase One if merited by new enrollment data.

(2) Assists college staff members on request.

3. Phase Three:

a. College Districts:

(1) Develop rationale supporting exceptional conditions influencing enrollments within the district.

(2) Work with Department staff to reconcile differences between state and district projections.

b. Department of Education:

(1) Coordinate effort to reconcile differences between state and district projections.

(2) Develop an enrollment projection document.

(3) Coordinate the process of gaining State Board acceptance of the enrollment projection document.

(4) Update projections as necessary.

D. Applying the Enrollment Projections to the Construction Assistance Plan

Enrollment projections for the second year of the biennium receiving budget consideration shall be used to predict the total space requirements of each institution. For instance, enrollment projections for the 1980-81 academic year shall be used to determine the Basic Space Needs (1.3) to be addressed in the capital budget request submitted to the 1979 Legislative Assembly. In addition, enrollment projections two and four years beyond the biennium under consideration will be applied to estimate space needs that can be anticipated in future bienniums.

APPENDIX C

COMMUNITY COLLEGE SPACE CLASSIFICATION

1977

SOURCE DOCUMENTS:

Higher Education Facilities Inventory and Classification Manual
National Center for Higher Education Management Systems
December 1972

State of Oregon Facilities Inventory Classification System
Oregon Educational Coordinating Commission
February 1974

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COMMUNITY COLLEGE SPACE CLASSIFICATION

The following described spaces are clearly reimbursable facilities. This means that buildings or portions of buildings containing spaces for these functions are eligible for state reimbursement of construction costs.

Facilities designed to house instructional programs and support those programs are clearly reimbursable. Those facilities are identified as "Building Blocks" in large general descriptive categories.

There are a number of facilities which fall into the questionable category and their reimbursement status must be determined by the use of this space for instructional purposes or instructional support. If a portion of a space is used for reimbursable-type activities, and the remainder is not used to house reimbursable-type activities, the two types of spaces will be separated and reimbursement prorated by an authorized representative of the Department of Education.

When identifying the current use of existing space in facility utilization and inventory for the purpose of establishing basic space need, an effort must be made to distinguish between allowable and not allowable use of a facility. This same criteria is used in determining how much space is currently used for a particular function and how much of the time is also utilized in support of that function.

The determination of allowable function and space may be a highly subjective activity and open to considerable question. If a college questions the outcome of a particular evaluation, the department will utilize a technical committee to review the process and conclusion. The proration process will utilize this committee to make final determination of utilization and space division.

The proration function will be aided by a Department of Education effort to utilize standards of space and utilization when mixed use of a space takes place or where allowable space is mixed with not allowable space types.

COMMUNITY COLLEGE SPACE CLASSIFICATION

	BUILDING BLOCK*	NUMBER	DESCRIPTION
I.	Classrooms	110	Classroom
		119	Classroom Service
II.	Laboratories/Shops	210	Class Laboratory
		219	Class Laboratory Service
		220	Special Class Laboratory
		229	Special Class Laboratory Service
		230	Individual Study Laboratory
		239	Individual Study Laboratory Service
III.	Office	310	Office
		319	Office Service
		350	Conference Room
		359	Conference Room Service
		651	Staff Lounge Facilities
		659	Lounge Facilities Service
IV.	Library/Learning Resources	410	Reading/Study Room
		420	Stack
		430	Open-Stack Reading Room
		440	Library Processing Room
		459	Study Facilities Service
		530	Audio-Visual, Radio, TV Facilities
		539	Audio-Visual, Radio, TV Facilites Service
V.	Special Use	540	Clinic Facilities
		549	Clinic Facilities Service
		550	Demonstration Facilities
		559	Demonstration Facilities Service
		560	Field-Service Facilities
		570	Animal Quarters
		579	Animal Quarters Service
		580	Greenhouse Facilites
		589	Greenhouse Facilities Service
VI.	Physical Education	520	Athletic - Physical Education Facilities
		529	Athletic - Physical Education Facilities Service
VII.	Assembly & Exhibition	610	Assembly Facilities
		619	Assembly Facilities Service
		620	Exhibition Facilities
		629	Exhibition Facilities Service
		680	Meeting Room Facilities
		689	Meeting Room Facilities Service
		690	Locker Room Facilities

BUILDING BLOCK	NUMBER	DESCRIPTION
VIII. Support Space	710	Data Processing-Computer Facilities
	719	Data Processing-Computer Facilities Service
	720	Shop Facilities
	729	Shop Facilities Service
	730	Storage Facilities
	739	Storage Facility Service
	740	Vehicle Storage
	749	Vehicle Storage Service
IX. Non-Assignable Space	010	Custodial Area
	020	Circulation Area--Interior
	021	Circulation Area--Exterior Covered
	030	Mechanical Area
	070	Structural Area
*Unclassified Space (For purposes of determining "eligibility" for state construction assistance)	040	Inactive Area
	041	Non-Useable Area
	050	Alteration or Conversion Area
	060	Unfinished Area

I

CLASSROOM BUILDING BLOCK

110 CLASSROOM

Definition: A room used by classes which does not require special-purpose equipment for student use. Included in this category are rooms generally referred to as lecture rooms, lecture-demonstration rooms, seminar rooms, and general purpose classrooms. A classroom may be equipped with tablet arm chairs (fixed to the floor, joined together in groups, or flexible in arrangement), tables and chairs (as in a seminar room), or similar types of seating. A classroom may be furnished with special equipment appropriate to a specific area of study if this equipment does not render the room unsuitable for use by classes in other areas of study.

Limitations: This category does NOT include conference rooms, auditoriums, or class laboratories. Conference rooms are distinguished from seminar rooms on the basis of primary use; a room with tables and chairs which is used primarily for meetings (as opposed to classes) is a conference room. Auditoriums are distringuished from lecture rooms on the basis of primary use; a large room with seating oriented toward some focal point which is used for dramatic or musical productions, or for general meetings is an assembly facility (i.e., an auditorium normally used for other than scheduled classes). Class laboratories are distinguished from classrooms on the basis of equipment in the room and by its limited use; a room with specialized equipment such as laboratory benches, typewriters, desk calculators, drafting tables, musical equipment, (instructional) shop equipment, etc., which is used for instructional purposes is a class laboratory.

119 CLASSROOM SERVICE

Definition: A room which directly serves a classroom as an extension of the activities of the classroom. Included in this category are projection rooms, cloak rooms, preparation rooms, closets, and storage if they serve a classroom.

Limitations: This category does NOT include projection rooms, cloak room, preparation rooms, closets, and storage if such rooms serve laboratories, conference rooms, assembly facilities, etc. A projection booth in an auditorium is classified as assembly facilities service.

II

LABORATORY BUILDING BLOCK

210 CLASS LABORATORY

Definition: A room used by regularly scheduled classes which require special-purpose equipment for student participation, experimentation, observation, or practice in a field of study. The design and/or equipment in such a room normally precludes its use for other areas of study. Included in this category are rooms generally referred to as teaching laboratories, instructional shops, typing laboratories, drafting rooms, band rooms, choral rooms, (group) music practice rooms, language laboratories, (group) studios, and similar specially designed and/or equipped rooms IF they are used primarly for group instruction in regularly scheduled classes.

Limitations: This category does NOT include laboratory rooms which serve as individual (or independent) study rooms (see 230 and 410). It does NOT include laboratories used for group instruction which are informally or irregularly scheduled (see 220). This category does NOT include rooms generally referred to as research laboratories (see 250). It does NOT include gymnasiums, pools, drill halls, laboratory schools, teaching clinics, demonstration houses, and similar facilities which are included under SPECIAL USE FACILITIES.

219 CLASS LABORATORY SERVICE

Definition: A room which directly serves a class laboratory as an extension of the activities of the class laboratory. Included in this category are balance rooms, cold rooms, stock rooms, dark rooms, equipment issue rooms, animal rooms, greenhouses, and similar facilities which serve a class laboratory.

Limitations: This category does NOT include balance rooms, cold rooms, stock rooms, dark rooms, animal rooms, greenhouses, etc., which serve a non-class laboratory.

220 SPECIAL CLASS LABORATORY

Definition: A room used by informal (or irregularly) scheduled classes which require special-purpose equipment for student participation, experimentation, observation, or practice in a field of study. The design and/or equipment in such a room normally precludes its use for other areas of study. Special class laboratories typically (but not necessarily or exclusively) include such rooms as language laboratories, (group) music practice rooms, (group) studios, etc.

Limitations: This category does NOT include class laboratories (210), individual study rooms (230 and 410), nor research laboratories (250). It does NOT include gymnasiums, pools, drill halls, laboratory schools, teaching clinics, demonstration houses, and similar facilities which are included under SPECIAL USE FACILITIES.

229 SPECIAL CLASS LABORATORY SERVICE

Definition: A room which directly serves a special class laboratory as an extension of the activities in such a facility.

Limitations: This category does NOT include rooms which serve class laboratories, individual study laboratories, or non-class laboratories.

230 INDIVIDUAL STUDY LABORATORY

Definition: A room especially equipped and/or designed for individual student experimentation, observation, or practice in a particular field of study. Included in this category are music practice rooms, individual study laboratories, and similar rooms which serve a particular subject-matter area. Stations may be grouped (as in a music practice room) or individualized (as in an individual study laboratory).

Limitations: This category does NOT include individual study facilities which are intended for general study purposes. Study facilities not related to a specific area of study are classified as study rooms (410).

239 INDIVIDUAL STUDY LABORATORY SERVICE

Definition: A room which directly serves an individual study laboratory as an extension of the activities in such a facility.

Limitations: This category does NOT include rooms which serve class laboratories, special class laboratories, non-class laboratories, or study facilities.

III

OFFICE BUILDING BLOCK

310 OFFICE

Definition: A room used by faculty, staff, or students working at a desk (or table). Included in this category are rooms generally referred to as faculty offices, administrative offices, clerical offices, student or graduate assistant offices, teaching assistant offices, etc. Also included in this category is a studio (music, art, etc.) if such a room serves as an office for a staff member. (A studio intended to serve a group of students is classified under laboratory facilities.) An office typically is equipped with one or more desks, chairs, tables, bookcases, and/or filing cabinets.

Limitations: This category does NOT include rooms which are equipped both as office and "research laboratory." A room equipped with laboratory benches, specialized scientific equipment, and/or such utilities as gas, water, steam, air, etc., is classified as a non-class laboratory. Note that this distinction rests on equipment rather than function. It is recommended that those rooms which have office-type equipment and fixed laboratory-type equipment (primarily in the biological and physical sciences) within the same room be classified within the non-class laboratory category. However, an appropriate proration of office and non-class laboratory may be made for such rooms. Large rooms, such as glass shops, printing shops, reading rooms, research laboratories, etc., which have a desk space for a technician or staff member are classified according to the primary purpose of the room rather than office. However, the office portion of the space may be prorated as office.

319 OFFICE SERVICE

Definition: A room which directly serves an office (or group of offices) as an extension of the activities in an office (or group of offices). Included in this category are file rooms, mimeograph rooms, vaults, waiting rooms, interview rooms, closets, private toilets, records rooms, and office supply rooms. Centralized mimeograph and printing shops which are campus-wide in scope should be classified as Shop Facilities.

Limitations: This category does NOT include centralized mimeograph and printing shops.

350 CONFERENCE ROOM (OFFICE RELATED)

Definition: A room serving an office complex and used primarily for staff meetings and departmental activities other than instructional activities. A conference room may be equipped with tables and chairs, lounge-type furniture, straight-back chairs, and/or tablet arm chairs. It typically (but not necessarily) is assigned to a department for its use. It is distinguished from such classroom facilities as seminar rooms, lecture rooms, and general classrooms because it is used primarily for activities other than (scheduled) classes.

Limitations: This category does NOT include classrooms, seminar rooms, lecture rooms, auditoriums, interview rooms, lounges, or meeting rooms.

359 CONFERENCE ROOM SERVICE (OFFICE RELATED)

Definition: A room which directly serves a conference room as an extension of the activities of the conference room. Included in this category are such rooms as kitchenettes, chair storage rooms, projection rooms, sound equipment rooms, etc.

Limitations: This category does NOT include kitchens, dining rooms, and similar facilities in a centralized conference-type building.

651 STAFF LOUNGE FACILITIES

Definition: A room used for the rest and relaxation of staff members. A staff lounge is typically equipped with upholstered furniture, draperies and/or carpeting.

Limitations: A lounge is distinguished from a conference room by its more informal atmosphere and its general public availability. a "lounge" area associated with a toilet is nonassignable space and classified as mechanical area.

659 LOUNGE FACILITIES SERVICE

Definition: A room which directly serves a lounge, such as a kitchenette.

LIBRARY-LEARNING RESOURCE CENTER BUILDING BLOCK

410 READING/STUDY ROOM

Definition: A room used to study books or audio-visual materials on an individual basis. Included in this category are rooms generally referred to as library reading rooms, carrels, study rooms, individual study stations, study booths, and similar rooms which are intended for general study purposes. Study stations may be grouped (as in a library reading room) or individualized (as in a carrel). Study stations in a reading/study room may include typewriters, remote terminals of a computer, electronic display equipment, etc. (also see 430).

Limitations: This category does NOT include individual study laboratories. An individual study laboratory is limited in use to a particular area of study, while a reading/study room is intended for general study (or a broad area of study). This category does NOT include classrooms, class laboratories, special class laboratories, non-class laboratories, offices, combined sleeping-study rooms in residence halls or other housing units, waiting rooms, or lounges.

420 STACK

Definition: A room (or portion of a room) used to provide shelving for books or audio-visual materials used by staff and/or students on an individual basis. Included in this category are rooms generally referred to as library stacks (also see 430).

Limitations: This category does NOT include book-shelf space in classrooms, laboratories, or offices. Audio-visual film and tape libraries which generally serve groups (rather than individuals) are classified as AV-Radio-TV Facilities. Separate tape storage rooms for language laboratories should be classified as laboratory service. Separate rooms containing musical scores, records, and tapes are classified as stack if the primary purpose of the materials is for instruction or research (as in a Library or Music Building). Rooms containing such materials and intended for listening enjoyment (as in a Student Union) should be classified as recreation facilities service. Stacks serving non-class laboratories should be classified as non-class laboratory service.

430 OPEN-STACK READING ROOM

Definition: A room which is a combination of reading/study room and stack, generally without physical boundaries between the stack areas and the study areas. Included in this category are rooms generally referred to as open-stack reading rooms.

Limitations: This category would NOT be used if the area of an open-stack reading room can be prorated to reading/study room and stack at the time a physical inventory is made. This category might be used as a "working-purposes" category if proration on some appropriate basis is anticipated. Further limitations are defined under reading/study room (410) and stack (420).

440 LIBRARY PROCESSING ROOM

Definition: A room which serves a reading/study room, stack, or open-stack reading room as a supporting service to such rooms. Included in this category are rooms generally referred to as card catalog, circulation desk, bookbinding, microfilm processing, and audio-visual record-playback equipment for distribution to individual study stations.

Limitations: This category does NOT include such library spaces as: Offices for staff (which are classified as offices); campus-wide or centralized audio-visual preparation areas, bookbinding, and microfilm processing areas (which are classified as shops); instructional facilities for library science (which are classified as classrooms, class laboratories, special class laboratories, offices, or other appropriate designations).

459 STUDY FACILITIES SERVICE

Other categories in these TYPE OF ROOM DEFINITIONS have provided a "service" category for each type of room. Because such facilities are minimal in library-type spaces, this one category of study facilities service is provided for all types of STUDY FACILITIES.

Definition: A room which directly serves a reading/study room, stack, open-stack reading room, or library processing room as a direct extension of the activities in such rooms. Included are such areas as closets, locker space, coatrooms, etc.

Limitations: This category does NOT include card catalogs, circulation desks, and other areas designated under Library Processing Room (440).

530 AUDIO-VISUAL, RADIO, TV FACILITIES

Definition: A room or group of rooms used in the production and distribution of instructional media. This category includes rooms generally referred to as TV studios, radio studios, sound studios, graphics studios, and similar rooms.

Limitations: Studios used primarily as part of an instructional program to train students in communication techniques should be classified as class laboratories (if scheduled) or special class laboratory (if not scheduled).

539 AUDIO-VISUAL, RADIO, TV FACILITIES SERVICE

Definition: A room which directly serves an audio-visual, radio or TV facility as an extension of the activities in such facilities. Included in this category are rooms generally referred to as film library, tape library, control room, video tape recorder room, property storage, recording rooms, and engineering maintenance rooms.

Limitations: Control rooms, recording rooms, and similar facilities used primarily to train students in communication techniques should be classified as class laboratories (if scheduled) or special class laboratory (if not scheduled).

SPECIAL USE AREAS BUILDING BLOCK

540 CLINIC FACILITIES (NON-MEDICAL)

Definition: A room used for the diagnosis and/or treatment of students in a program other than medicine. Included in this category are rooms generally referred to as testing and treatment rooms. Clinics are typically associated with such educational areas as speech and hearing, remedial reading, and remedial writing.

Limitations: This category does NOT include clinics associated with student health care. It does NOT include clinics for the medical or dental treatment of humans or animals.

549 CLINIC FACILITIES SERVICE (NON-MEDICAL)

Definition: A room which directly serves a clinic as an extension of the activities in a clinic. Included in this category are waiting rooms, observation rooms, records rooms, and similar supporting rooms.

Limitations: This category does NOT include rooms which serve medical care facilities.

550 DEMONSTRATION FACILITIES

Definition: A room (or group of rooms) used to practice the principles of certain subject-matter areas, particularly teaching and home management. This category includes demonstration schools, laboratory schools, preschool nurseries, etc., IF the facilities support the training of the college-level students in training as teachers or teacher aides. This category includes home management houses which serve to train college-level students in home management.

Limitations: Demonstration schools, laboratory schools, preschool nurseries, and home management houses in which the students serve as the subjects for a research study are classified as non-class laboratory. Rooms which serve nursery, elementary, or secondary school students (in a laboratory school or preschool nursery) will NOT be classified as classroom, class laboratory, office, etc., but rather as Demonstration Facilities. However, classrooms or class laboratories in such facilities used primarily for collegiate-level students should be classified as classrooms or class laboratories. Offices and conference rooms used by collegiate-level staff should be designated offices and conference rooms.

559 DEMONSTRATION FACILITIES SERVICE

Definition: A room which directly serves a demonstration facility as an extension of the activities of the demonstration facility. Included in this category are facilities generally referred to as storerooms, laundry, etc. (in a home demonstration facility) and kitchen, lockers, shower rooms, etc. (in a laboratory school).

Limitations: The distinction between demonstration facilities and demonstration facilities service is somewhat arbitrary. In general, the primary activity areas such as kitchen, dining room, living room (in a home demonstration house) or classroom, laboratories, gymnasiums (in a laboratory school) should be designated as demonstration facilities.

560 FIELD-SERVICE FACILITIES

Definition: A barn or similar structure for animal shelter or the handling, storage, and/or protection of farm products, supplies, and tools. Included are barns, animal shelters, sheds, silos, feed units, hay storage, and seedhouses. Greenhouses related to farm operations are included in this category. Structures are typically of light frame construction with unfinished interiors, usually related to agricultural field operations, and are frequently located outside the central campus area.

Limitations: Location of a building is NOT sufficient justification for classification as a field-service facility. Finished rooms such as endocrine research laboratories, dairy research laboratories, etc., should be classified as non-class laboratories.

570 ANIMAL QUARTERS

Definition: A room that houses laboratory animals maintained for the institution for research and/or instructional purposes. This category includss rooms generally referred to as animal rooms, cage rooms, stalls, wards, and similar rooms that are used to house animals intended for use in class laboratories, non-class laboratories, special class laboratories, or individual study laboratories.

Limitations: Does NOT include areas for treatment of patient animals. See Health Care Facilities (800).

579 ANIMAL QUARTERS SERVICE

Definition: A room that directly serves an animal care facility as an extension of the activities in that facility. The category includes rooms generally referred to as feed storage rooms, feed mixing rooms, cage washing rooms, and similar facilities.

Limitations: Does NOT include spaces that directly serve areas used for the treatment of patient animals. See Health Care Facilities (800).

580 GREENHOUSE FACILITIES

Definition: A building or room, usually composed chiefly of glass or other light transmitting material, for the cultivation and/or protection of plants.

Limitations: Does NOT include greenhouses related to farm operations (see 560).

589 GREENHOUSE FACILITIES SERVICE

Definition: A room that directly serves a greenhouse facility as an extension of the activities in that facility. Includes rooms generally referred to as headhouses.

Limitations: Does NOT include greenhouse service rooms related to farm operations (see 560).

VI

PHYSICAL EDUCATION BUILDING BLOCK

520 ATHLETIC-PHYSICAL EDUCATION FACILITIES

Definition: A room (or area) used by students, staff, or the public for athletic activities. Included in this category are rooms generally referred to as gymnasiums, basketball courts, handball courts, squash courts, wrestling rooms, swimming pools, ice rinks, indoor tracks, indoor "fields," and fieldhouses.

Limitations: This category does NOT include classrooms, laboratories, or offices even though they may be located in an athletic building. This category does NOT include the spectator seating area associated with athletic facilities (see below). It does NOT include outside fields, tennis courts, archery ranges, etc.

529 ATHLETIC-PHYSICAL EDUCATION FACILITIES SERVICE

Definition: A room which directly serves an athletic-physical education facility as an extension of the activities in such a facility. Included in this category are rooms generally referred to as locker rooms, shower rooms, coaches' rooms, ticket booths, dressing rooms, equipment supply rooms, first aid rooms, skate sharpening rooms, towel rooms, etc.

Limitations: This category does NOT include public toilet rooms.

VII

ASSEMBLY-EXHIBITION BUILDING BLOCK

610 ASSEMBLY FACILITIES

Definition: A room designed and equipped for dramatic, musical, , or livestock judging activities. This category includes rooms generally referred to as theatres, auditoriums, concert halls, arenas, , and (livestock) judging pavilions. Seating areas, stage, orchestra pit, , arena, and aisles are included in assembly facilities.

Limitations: Assembly rooms are NOT primarily used for instructional purposes (see Classroom Facilities).

619 ASSEMBLY FACILITIES SERVICE

Definition: A room which directly serves an assembly facility as an extension of the activities of such a facility. This category includes check rooms, coatrooms, ticket booths, dressing rooms, projection booths, property storage, makeup rooms, costume storage, green rooms, control rooms, etc.

Limitations: Lobbies are nonassignable space classified as circulation space.

620 EXHIBITION FACILITIES

Definition: A room used for exhibits. This includes museums, art galleries, and similar exhibition areas.

Limitations: Study collections NOT primarily for general exhibition such as departmental displays of anthropological, botanical, or geological specimens should be classified under an appropriate laboratory facility category.

629 EXHIBITION FACILITIES SERVICE

Definition: A room which directly serves an exhibition facility as an extension of the activities in such a facility. This includes work rooms for the preparation of materials and displays, vault or other storage for works of art, check rooms, etc.

Limitations: Research areas in a museum are classified as non-class laboratories or non-class laboratory service.

680 MEETING ROOM FACILITIES

Definition: A room used for a variety of non-class meetings. A meeting room may be equipped with tables and chairs, lounge-type furniture, straight-back chairs, and/or tablet arm chairs. Although it may be assigned to a specific organizational unit, it is used primarily by groups for general purposes such as student senate, student government, community groups, and short-term meetings such as those conducted by an extension division. A meeting room is distinguished from a conference room (350) because conference rooms are considered part of an office complex and are generally used for staff meetings or other departmental non-class activities.

Limitations: Rooms serving an office complex and used primarily for staff meetings are classified as conference rooms (350). Seminar rooms used primarily for scheduled classes are classified as classrooms (110).

689 MEETING ROOM FACILITIES SERVICE

Definition: A room that serves a meeting room as an extension of the activities in that room. Included would be such rooms as kitchenettes, chair storage rooms, projection rooms, sound equipment rooms, etc.

Limitations: This category does NOT include rooms such as kitchenettes and chair storage rooms which serve conference rooms.

690 LOCKER ROOM FACILITIES

Definition: A room used for changing clothes and/or storing personal materials. Includes service rooms intended for student and/or staff use principally for storage of clothing and/or individual materials, e.g., physical plant locker rooms.

Limitations: Does NOT include physical education or intercollegiate athletic locker rooms and areas.

VIII

SUPPORT SPACE BUILDING BLOCK

710 DATA PROCESSING-COMPUTER FACILITIES

Definition: A room (or group of rooms) for institution-wide processing of data by machines or computers. This category includes keypunch rooms, electronic data processing rooms, electronic computer rooms, and similar data processing areas.

Limitations: This category does NOT include rooms containing desk calculators, posting-billing machines, check-writing machines, and similar office or office service rooms. It is recommended that the area occupied by a keypunch machine, sorter, or other EDP equipment in a room otherwise classifiable as an office NOT be prorated to this category. A data processing facility used only for instruction should be classified as a class laboratory. However, a facility used jointly for instruction and/or research and/or administrative data processing should be included in this category. (Note that the allocation or proration of facilities recorded in this category to "instruction," research," "public service," "library," "general administration," etc., can be accomplished separately by THE PROGRAM or FUNCTION; i.e., independently of this room-type classification.)

719 DATA PROCESSING-COMPUTER FACILITIES SERVICE

Definition: A room which directly serves a data processing-computer facility as an extension of the activities of that facility. This category includes such rooms as card storage, paper form storage, tape storage, tape storage vaults, control rooms, plugboard storage, wiring rooms, equipment repair rooms, observation rooms, and similar service areas.

Limitations: This category does NOT include offices for data processing personnel which should be classified as offices.

720 SHOP FACILITIES

Definition: A room used for the manufacture or maintenance of products and equipment. This category includes such rooms as carpenter shops, plumbing shops, electrical shops, painting shops, and similar physical plant maintenance facilities. It also includes central printing and duplicating shops, central receiving, and central stores.

Limitations: This category does NOT include instructional shops; industrial arts and vocational-technical shops used for instruction should be classified as class laboratories. Highly specialized shops for the production of scientific apparatus and equipment should be classified as laboratory service (class laboratory service or non-class laboratory service). Materials preparation areas in audio-visual, radio stations, and TV studios should be classified as audio-visual, radio, TV facilities. Maintenance and repair areas of vehicles, airplaines, boats, etc., should be classified as vehicle storage service. Engineering drafting rooms serving the physical plant operation are classified as offices. Blueprint storage rooms are classified as office service.

729 SHOP FACILITIES SERVICE

Definition: A room which directly serves a shop as an extension of the activities in such a room. Included in this category are tool supply-storage rooms, materials storage rooms, and similar equipment or material supply and/or storage rooms. Shower rooms, lunch rooms, and similar non-public areas should be included.

Limitations: This category does NOT include service areas related to class or non-class laboratories. It does NOT include vehicular repair facilities ("garages") which are classified as vehicle storage service. Blueprint storage rooms should be classified as office service. Public toilets are NOT included.

730 STORAGE FACILITIES

Definition: A room used to store materials. Classification of a room as a storage facility is limited by definition to a central storage facility (warehouse) and inactive departmental storage. Storage related to other types of space follow the classification of that type of space with a "service" designation. For example, a storage closet for office supplies is classified as office service. The destinction between a "service" classification and "storage" rests on the possibility of physical separation of the materials stored. If the material being stored could be placed in a warehouse, implying only occasional demand for the materials, then storage facility is the appropriate classification. Storage which must be close at hand, by the nature of the materials stored and the demands placed upon them by the program, should be classified according to the appropriate "service" category.

739 STORAGE FACILITY SERVICE

Definition: A room which directly serves a storage facility.

740 VEHICLE STORAGE

Definition: A room which is used to store vehicles. This category includes rooms generally referred to as garages, boat houses, airport hangars, parking structures, and other storage areas for vehicles (broadly defined).

Limitations: This category does NOT include portions of barns or similar field-service facilities which are to house farm implements.

749 VEHICLE STORAGE SERVICE

Definition: This category includes any area associated with a vehicle storage facility which is used for the maintenance and repair of automotive equipment, boats, airplanes, and similar vehicles.

Limitations: This category does NOT include service areas which serve building maintenance and repair which are classified as shop facilities.

XI. Non-assignable Space

Definition: That portion of the area of a building that is not available for assignment to building occupants but that instead is necessary for general operation of the building. By definition, non-assignable area consists exclusively of the following: circulation, custodial, mechanical, and structural areas.

IX

NON-ASSIGNABLE SPACE

010 CUSTODIAL AREA

Definition: "Custodial Area" should be construed to mean the sum of all areas on all floors of a building used for building protection, care, maintenance, and operation. Included should be such areas as custodial, janitors' closets, maintenance storerooms, etc.

Limitations: Deductions should not be made for columns and projections necessary to the building.

020 CIRCULATION AREA--INTERIOR

Definition: "Circulation Area" should be construed to mean that portion of the gross area--whether or not enclosed by partitions--which is required for physical access to some subdivision of space. Circulation areas should include, but not be limited to: Corridors (access, public, service, also "phantom" for large unpartitioned areas); elevator shafts; escalators; fire towers or stairs; stairs and stair halls; loading platforms (except when required for operational reasons and, thus, includable in net assignable area); lobbies (elevator, entrance, public, also public vestibules); tunnels and bridges (not mechanical).

Limitations: When assuming corridor areas, only horizontal spaces required for general access should be included--not aisles which normally are used only for circulation within offices or other working areas. Deductions should not be made for columns and projections necessary to the building.

021 CIRCULATION AREA--EXTERIOR COVERED

Definition: An exterior corridor is a covered space outside the four walls enclosing a building which is used to provide individual or equipment access to the enclosed areas. This space may be supported by columns and connect buildings, may be an appendage to an existing building, or be part of the total structural system. Areas used to provide circulation space which are under the extended roof of a building should also be counted as exterior corridors. These areas go under the names of porches, ramps, walkways, etc.

Limitations: This area is not to be confused with interior corridors. Exterior walkways or ramps which are not covered are not to be inventoried. Deductions should not be made for columns supporting them.

030 MECHANICAL AREA

Definition: "Mechanical Area" should be construed to mean that portion of the gross area designed to house mechanical equipment, utility services, and non-private toilet facilities. Mechanical area should include, but not be limited to: Air-duct shafts; boiler rooms; fixed mechanical and electrical equipment rooms; fuel rooms; mechanical service shafts; meter and communications closets; service chutes; stacks; and non-private toilet rooms (custodial and public).

Limitations: Deductions should not be made for columns and projections necessary to the building.

070 STRUCTURAL AREA

Definition: "Structural Area" should be construed to mean that portion of the gross area which cannot be occupied or put to use because of the presence of structural features of the building. Precise computation of structural area by direct measurement is not contemplated under these definitions. Structural area should generally be determined by assuming it to be the residual area after the assignable, circulation, custodial, and mechanical areas have been subtracted from the gross area.

Limitations: This category does not include areas presently under construction. Those areas are Unfinished (060).

UNCLASSIFIED SPACE

NOTE: When the inventory is used to establish eligibility for state construction assistance, areas assigned to any of the following space classification must be approved by the Oregon Department of Education.*

040 INACTIVE AREA

Definition: "Inactive Area" should be construed to mean all spaces (rooms or other assignable floor areas) which are available for assignment but which are unassigned at the time of the facilities inventory.

Limitations: This excludes all space used or not available for use.

041 NON-USEABLE AREA

Definition: "Non-Useable Area" should be construed to mean all spaces which are not suitable for assignment.

Limitations: This excludes all space constructed by the college.

050 ALTERATION OR CONVERSION AREA

Definition: "Alteration or Conversion Area" should be construed to mean all spaces (rooms or other assignable floor areas) that are not in use at the time of the inventory because of new construction, major alterations, condemnation, temporarily out of use because they are under conversion (or rehabilitation), or other similar reasons.

Limitations: This excludes all space used or available for use.

060 UNFINISHED AREA

Definition: "Unfinished Area" should be construed to mean all space not in use at the time of the inventory because the space is unfinished, whether in new buildings or in existing buildings.

Limitations: This excludes rooms which do not have floors and/or a full headroom of at least 6'6".

*PROCEDURE FOR USE OF THE CLASSIFICATION CATEGORIES

A. 040 Inactive Area

This classification is provided for in the Federal Higher Education Manual (1972) and should be used when required in making federal reports.

It is anticipated that this classification category will be maintained to inventory space constructed by the district and for federal reporting purposes only. See 041 below.

B. 041 Non-Useable

This classification is not provided for in the Federal Higher Education Manual (1972). When federal reports are made, space classified in this category (for state construction assistance purposes) should be reported under 040 above.

Procedure To Be Used In Assigning Space To This Area--For State Construction Assistance Purposes

1. It is determined that the space meets the following general requirements:

   a. Was not constructed by the college district.

   b. Is "allowable space" as defined in CAP.

2. It is further determined that the space is unuseable for one or more of the following reasons:

   a. Remodeling-A: Requires restoration to present acceptable standards without major room use changes, alterations, modernizations, or expansion. The approximate cost of Remodeling A is not greater than 25% of the estimated replacement cost of the facility.

   b. Remodeling-B: Requires major updating and/or modernization of the facility. The approximate cost of Remodeling B is greater than 25%, but not greater than 50% of the estimated replacement cost of the facility.

   c. Remodeling-C: Requires major remodeling of the facility. The approximate cost of Remodeling C is greater than 50% of the replacement cost of the facility.

   d. Demolition: Should be demolished or abandoned because the facility is unsafe or structurally unsound, irrespective of the need for the space or the availability of funds for a replacement.

   e. Termination: Planned termination or relinquishment of occupancy of the facility for reasons other than unsafeness or structural unsoundness, such as abandonment of temporary units or vacation of leased space.

3. College district officials should identify space that, in their judgment, meets the criteria set forth in #1 and #2 above and request a review and confirmation by Department staff.

C. 050 Alteration or Conversion Area

This classification category may be used--as defined above--to inventory space as provided for in CAP (e.g., see page 7, D, 1 of CAP).

D. 060 Unfinished Area

(Same as 050 above)

APPENDIX D: SPACE NORMS

The square foot standards are the sum of the space allocations of the building blocks:

	Building Block	Large College	Small College
1.	(1) Classroom	9.0	10.8 SF
2.	(2) Laboratory/Shop	17.1	19.8
3.	(3) Office	11.0	14.0
4.	(4) Library/Resource Center	7.0	10.0
5.	(5) Special Use	1.8	1.8
6.	(6) Physical Education	0.0	0.0
7.	(7) Assembly Exhibition	0.0	0.0
8.	(8) Support	4.0	5.0
9.	Subtotal	49.9	61.4
10.	Non-Assignable	26.9	33.1
11.	Total SF Per FTE	76.8	94.5
12.	Physical Education *	38,200	38,200
13.	Assembly/Exhibition*	13,800	13,800

*plus:

a. 4.3 square feet per RFTE in excess of 3,000 for .9 of all RFTE for PE
b. 1.4 square feet per RFTE in excess of 3,000 for .9 of all RFTE for Assembly/Exhibition

Classroom and Laboratory/Shop utilization assumptions for the space standards above remain at basically the same level as initially established by the State Board in 1967.

a. These standards will be 33 hours per week of classroom use (75% of 45 available hours) and 20 hours of daily student station use (60% of 33 scheduled hours) for small college districts (under 3,000 RFTE). The use standards for large colleges (over 3,000 RFTE) will be 33 hours per week for rooms and 22 hours of weekly student station use. The result is to change the large college standard from 18 square feet per student station to 10 square feet per FTE and the small college standard from 21 square feet per student station to 12 square feet per FTE.

b. Laboratories/shop standards will be 24 hours weekly room use and 16 hours of weekly student station time for small colleges. For large colleges the standard will be 24 hours weekly room use and 17 hours of weekly student station time. The result is to change the large college standard of 65 square feet per student station to 19 square feet per FTE and the small college standard from 75 square feet per student station to 22 square feet per FTE.

c. The space standards and basic space need for the other building blocks (offices, support, assembly, etc.) have been derived by analysis of existing spaces in the 13 colleges, review of material (HEGIS) inventories, other published sources, input by a committee of local community college and state personnel, and their application to the projected RFTE.

In order to reflect the percent of the reimbursable FTE which is generated in space under the 24-hour control of the two sizes of colleges, the space standards for classrooms and laboratories have been adjusted to square footage allocations for 90% of that instructional space. The large college space standard then goes from 10 to 9 square feet per FTE for classrooms and 19.0 to 17.1 square feet per FTE for laboratory and shop areas. The small college space standard then moves from 12.0 to 10.8 square feet per FTE for classrooms and 22.0 to 19.8 square feet per FTE for laboratory and shop areas.

The space allocation for physical education and assembly/exhibition facilities for large colleges beyond the basic space also reflects the need to house only 90% of the Reimbursable FTE in those facilities.

APPENDIX E

PROJECT APPLICATION GUIDELINES

I. INTRODUCTION

A. In preparing project applications it is essential that:

1. The district use Department approved enrollment projections and a determination of eligible space as a prerequisite.
2. Long-range plans and program approvals be available to support the application(s).
3. Definition and procedures set forth in the Administrative Guidelines be used.

II. CALENDAR FOR APPLICATION PROCESS

(A timeline will be developed.)

III. SUGGESTED STEPS IN PREPARING PROJECT APPLICATIONS

Should include the following:

A. Confirm enrollment projections and space eligibility.

B. Identify the amount and type of space requirements in keeping with long-range plans and program requirements.

C. Determine the type and number of projects to be prepared for the biennium (e.g., new construction, purchase, etc.).

D. Complete Application Form(s) and secure appropriate approval and signatures.

IV. APPLICATION FORM

A. NEW CONSTRUCTION PROJECT

Information Needed

1. Institution _____

   a. Project Name _____

   b. Person preparing form _____

   c. Chairman of Board ___(signature)_____

   d. President ___(signature)_____

2. Location in District _____ /_____ /_____
   college campus other

3. Project Description (brief)

   (as it relates to "building blocks" and eligibility--in narrative form)

4. Proposed starting and completion date

5. Site for facility

6. Cost

   a. Total allowable cost $_____

      (estimated or appraised plus remodeling if applicable)

      *(1) Cost by building block, and by category within each block

      (also include square ft.)

Bldg. Block	Category	Sq. Ft.	Cost
#1	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
#2	_____	_____	_____
	_____	_____	_____
	_____	_____	_____

      Etc.

      (2) Equipment Cost _____

      (a) Instructional Programs _____

      (b) Other _____

_____

*Also see 7-a

(3) Other allowable costs

(i.e., site preparation, architect fees, etc.)

b. Total non-allowable costs _____

(describe)

Total cost _____

c. Locally financed cost _____

d. State (requested) cost _____

e. Other sources _____

7. Instructional Programs Housed

Programs	No. Training Stations	Total Sq. Feet	Equipment* Cost

*Should balance with 6-a-(2)-(a)

8. Relationship of Project to College District's Long-Range Plan

(i.e., extent plan and program enrollments and approvals document this need)

9. Information Pertinent to Ranking the Project

Based upon such ranking factors as:

- Percent of BSN

  (impact, if any, this project will have on temporary facilities)
- College district priority

B. PURCHASE PROJECT

Information Needed

(Same as for IV-A, except that A-6 may be adapted in keeping with cost data needs.)

V. DETAILED APPLICATION FORM INSTRUCTIONS

(To be developed when IV above is prepared in "application" form)

APPENDIX F: Pro-rating Projects

Pro-rating will be necessary under two circumstances;

A. The reimbursement of construction costs is limited to that portion of a facility which is needed to house the reimbursable function and its direct support space.

SITUATION A: A college may propose construction of a facility that is a mixture of reimbursable and non-reimbursable functions.

EXAMPLE 1: College "X: has a food service program instructional unit. They are proposing the construction of a new student union. That portion of the student union used as instructional space and direct support for the instructional program is reimbursable. The area used in the consumption of the food is not reimbursable.

EXAMPLE 2: College "Y" has the same situation as college "X" except that the food service preparation area is much larger than the area needed to support the program. As analysis of the scope of the present and projected basic space need indicates that a percent of the total food service area is reimbursable, and the remainder is not.

B. The reimbursement of construction costs is limited to that portion of the cost of a support facility which is needed to service reimbursable functions.

SITUATION B: A college may propose construction of a support facility that is needed by the entire campus. The campus is a mixture of reimbursable and non-reimbursable type facilities.

EXAMPLE 1: A heating plant is proposed to serve an entire campus. Only 85% of the campus gross square footage is of a reimbursable type, yet the heating plant serves the entire campus. The college can expect to receive reimbursement on 65% of 85% of the cost of constructing a heating plant.

Pro-rating will result in establishing the allowable space (to be subtracted from eligibility) within the project and the cost of the allowable space.

The Department staff will establish guidelines for pro rating the space and costs of these projects.

APPENDIX G

PROGRAM AND LOCATION REVIEW PROCESS

Step I Program Approval/Enrollment Projections

Department of Education staff give tentative approval for new vocational-technical programs in time for preparation of enrollment projections.

Enrollment projections completed and verified or validated.

Step II Location Review and Approval

Department of Education staff will determine if new locations are being proposed by the college district.

Department of Education and Coordinating Commission staff will provide for tentative approval of the proposed new location in time for preparation of college planning for new facilities.

Step III Final Program and Local Approval

Department staff and State Board of Education in cooperation with the Coordinating Commission give final approval of program and location in time for preparation for ranking.

If this is not possible and approval is disallowed later and a ranked project is disallowed, college may substitute next highest ranked project if it would have received the ranking of the disallowed project.

APPENDIX H

PROCEDURE FOR RANKING PROJECTS

The following steps will be followed in ranking the projects submitted for funding:

1. The square footage of eligibility is calculated for each college.

2. The percentage of basic space need represented by the eligible space is calculated for each college.

3. The colleges are ranked according to the percentages calculated in Step 2 above. The college with the highest percent of unmet basic space need has the highest rank.

4. The application for a project by the college with the highest rank is examined to determine that it is a valid application. In making this determination, the minimum and maximum restrictions on the dollar support in B.2. (Limits of State Aid) of the plan will be noted. In addition, it will be determined that the project does not exceed the eligibility of the college.

5. If the application of the college with the highest rank is determined to be valid, the project is ranked number one and the amount of space generated by the application is subtracted from the eligibility of the college submitting the application.

6. The percentages of the colleges are recalculated and the ranking is done in the same manner as in Step 3. The procedure is repeated until all of the projects submitted have been ranked.

APPENDIX H-2

PROCEDURE FOR IDENTIFYING EXCEPTIONAL SPACE NEEDS

A. Assumptions

1. A college district appears to have special space needs--but has insufficient eligibility compared to other districts when the regular ranking procedure is applied (Appendix H-1).

2. Need is a function of the space available and the extent to which this space is used.

3. The space available may be temporary, or unowned (leased or rented) and satisfies a need in this manner; however, one objective of CAP is to provide for the unique space requirements of each district within the overall limitation of the CAP formula. The temporary or unowned facilities may be excessively inflating the operating expenses of the district.

4. Certain types of space may possess a higher priority, for the district and the State Board, than other space types for a specified time period.

B. Steps to be Followed in Identifying Exceptional Space Needs

If one or more of the above assumptions pertains, the steps outlined below will be followed in determining if an Exceptional Space Need exists:

By the College District --

1. Has been identified by the district board as its highest priority project in its long-range plan.

2. Has a plan-provisions for financing the local match for the project.

3. Can provide evidence that alternative means of meeting this space need have been exhausted at the district level (i.e., local remodeling to alleviate problem, revised use of existing facilities without remodeling, rental or lease without the incurring of excessive costs).

By the Department Staff --

1. Review the projects status (rank) under H-1 to determine if it may be eligible for state funds without consideration as an exceptional need.

2. Determine the extent to which it is compatible with the assumptions set forth in A-1 through 5 above.

3. Assess project eligibility in keeping with college district requirements under B-1 through 3 above.

4. Consider such other factors as,

   a. Utilization of present space in keeping with State Board objectives for use of space.

   b. Extent the project is compatible with the square footage set forth at the state level for the various building blocks.

   c. Amount of state funds received in the past in relation to other college districts.

   d. The experience and needs of other districts.

5. The Department staff will review-evaluate the information available--in keeping with the above listed assumptions--factors and recommend action to the Superintendent and State Board.

APPENDIX I

LONG-RANGE PLANNING AND THE CONSTRUCTION ASSISTANCE PLAN

I. Oregon's Community College Planning Environment.

The State Board of Education, the Oregon Educational Coordinating Commission (OECC) and the board of directors of each of Oregon's community college and area education districts share legislated responsibilities to plan for the development of Oregon's community colleges. The State Board is directed to cooperate with the OECC in the development of a comprehensive education plan (see ORS 326.075) and the board of each district is currently required to submit a long-range plan to the State Board, updating it each biennium (see ORS 341.930). This latter requirement is subject to some change in 1979 as ORS 341.930 will be deleted and superseded by new legislation; however, it is anticipated that future legislation will continue to require long-range planning at the district level. Figure One indicates the planning environment which exists as a result of current state legislation.

II. District-Level Planning.

Long-range planning has been required of community college districts since the beginning of the community college movement in Oregon. As a result, each of Oregon's community colleges began its formal operation with a published plan. Each plan was subsequently revised or rewritten on various occasions to respond to internal needs or meet state-level requirements. Most recently, during the 1975-77 biennium, each community college district provided updated planning information to the Department of Education in response to planning guidelines designed to meet the intent of ORS 341.930. Thus, each community college district recently (1) reconfirmed or adopted goals for the district, (2) reviewed and projected enrollment trends for each existing instructional program, (3) identified and justified proposed new instructional programs, (4) projected future operating costs, (5) computed current facility utilization ratios; and (6) identified facility needs anticipated through 1978-79.

As ORS 341.930 will continue to be in force until 1979, it will be necessary for each college district to again update its planning outcomes during the 1977-79 biennium. Figure Two identifies key planning outcomes which are scheduled for completion during this biennium.

III. The Construction Assistance Plan (CAP) and its Implications for Long-Range Planning.

The Construction Assistance Plan (CAP) is designed to utilize the common outcomes of institutional long-range planning (see Figure Two) to predict future space needs and to validate various aspects of each proposed construction project. Comparable enrollment projections will be required to equitably predict basic space needs. Planned new programs will need to be identified to justify proposed construction projects. Schedules for the elimination of temporary space will have to be developed to establish space eligibility. And, scenarios identifying the "completed" campus for each district will be necessary to identify exceptional space needs and to confirm needs for specific construction projects. Figure Three indicates how and where long-range planning outcomes will be used to implement the CAP.

FIGURE ONE

OREGON'S LONG-RANGE PLANNING ENVIRONMENT

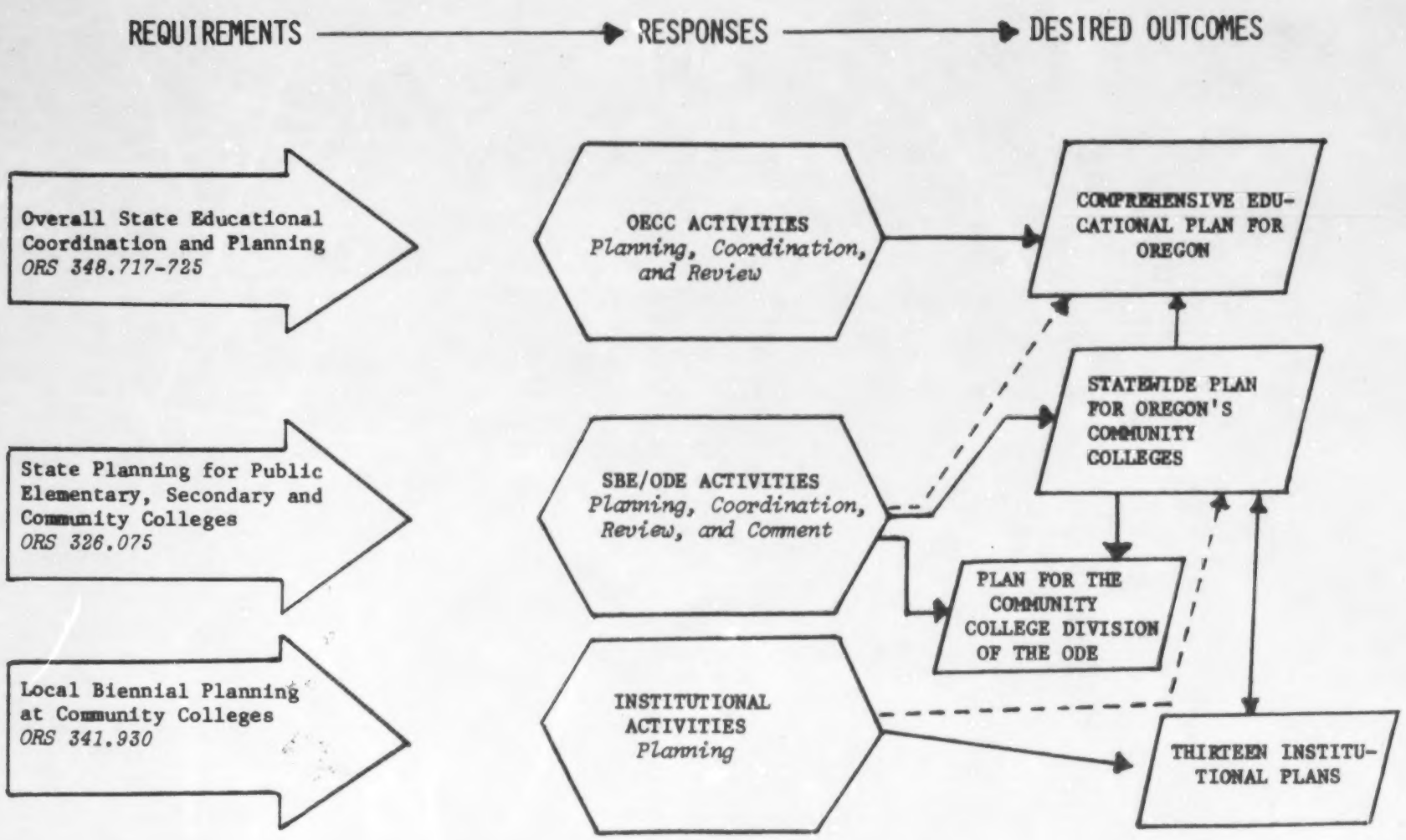


FIGURE TWO

COMMUNITY COLLEGE PLANNING OUTCOMES:
1977-1979

I. Mission

- A. Statement of Purpose
- B. Stated Goals for the College District
- C. Priority Objectives of the College

II. Programs

- A. Enrollment Projections
- B. Proposed New Programs
- C. Planned Program Changes

III. Facilities

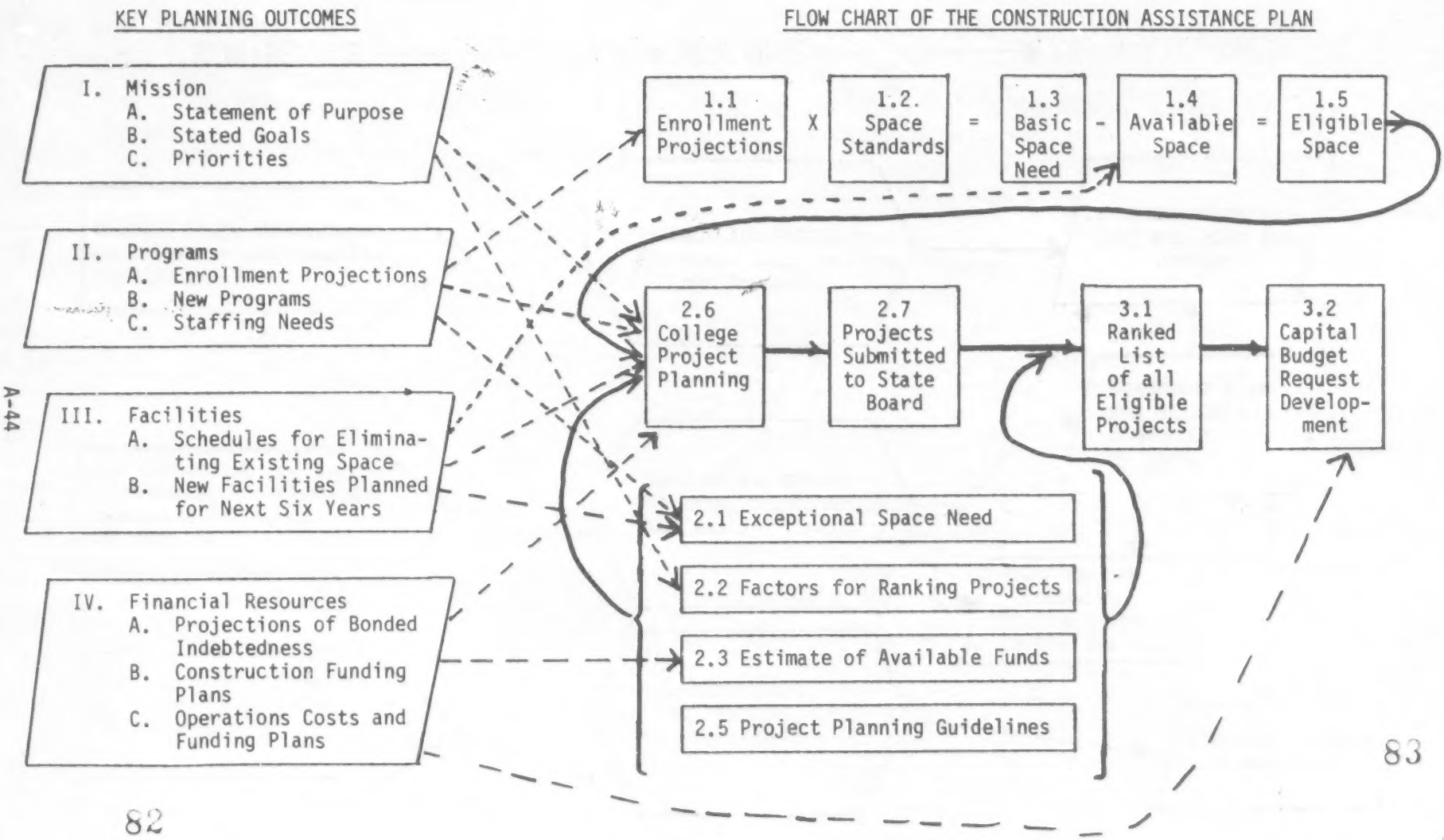
- A. Space Inventory and Utilization Data
- B. Schedule for Eliminating Existing (Temporary) Space (1978-79 through 1984-85)
- C. Schedule for Adding New Space
- D. Schedule for Remodeling Existing Space

IV. Financial Resources

- A. Capital Construction Cost and Funding Projections
- B. Operations Cost and Funding Projections

FIGURE THREE

LONG-RANGE PLANNING OUTCOMES
AND THE CONSTRUCTION ASSISTANCE PLAN



APPENDIX J

ALLOCATION OF FUNDS

Procedure for Allocating Funds by the State Board:

When funds have been authorized by the Legislature, the State Board will develop and implement such regulations as are necessary to allocate state funds for approved projects. Information to be provided will include:

A. Project Information*

1. Educational specifications
2. Preliminary Plans and Construction Documents
3. Bid award data
4. Progress reports on construction
5. Modifications or changes in plans

B. Payment of State Funds

Upon award of construction contract, the State Board will provide for:**

1. Setting aside the states share of project cost.
2. Periodic payment will be made based upon progress reports on construction.
3. Ten percent of the periodic payments will be withheld until final approval is given by the local board and State Board.

C. District Matching Funds

If a district with a State Board and legislatively approved project is unable to secure local matching funds by the end of the first year of a biennium, the State Board should be authorized (with the concurrence of the State Emergency Board) to reallocate the state funds for a project with a lower rating.

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* If the project includes purchase of existing buildings, a statement of purchase price and appraisal of the buildings need to be provided.

** If the project includes purchase of existing buildings, the state share of funds will be scheduled to the extent possible in accordance with the college districts expenditures.